A9055-5U 4/91

TVB

A RESEARCH TREND REPORT

TRENDS

IN CABLE TV

Prepared by the TVB Research Department

2/91

Television Bureau of Advertising, Inc., 477 Madison Avenue, New York, New York 10022 (212) 486-1111

TRENDS IN CABLE TELEVISION

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HIGHLIGHTS

* Cable is now in 58.9% of all TV households. Pay cable is in 29.0% of all TV households. Pay cable as a percent of cable households is now at 49.3%, down from a high of 60.9% in 1983. (PAGE 3)

* Estimates place cable penetration at 67% by 1998. (PAGE 4)

* Cable penetration remains highest in "B" & "C" counties, 64.6% and 63.6% respectively. (PAGE 5)

* Projections place cable TV ad revenues at only 7.9% of the total TV/cable pie by 1996. (PAGE 7)

* Cable TV's top 10 advertisers during January-September 1990 put only 5.8% of their TV budget into cable while placing 94.2% on over-the-air TV. (PAGE 9)

* The ratings of ad supported cable networks remain low with only ESPN & USA getting more than a 2.0 rating in cable households in a given daypart. (PAGE 12)

* Over-the-air viewing remains high even in pay cable households where the majority of the viewing is still to over-the-air stations. (PAGE 15)

* While the average cable TV household can receive 25.3 cable channels, it views only 5 of them or 20% during the course of a week. On the other hand it can receive 11.8 broadcast stations and views 6.4 or 54% of them during a week. (PAGE 16)

Cable and Pay Cable Households & Penetration

	Cable Households (000)	% of TV Households	Pay Cable Households (000)	% of TV Households	% Pay HH of Cable HH
1965	1,300	2.3	---	---	---
1966	1,900	3.3	---	---	---
1967	2,300	3.9	---	---	---
1968	2,800	4.7	---	---	---
1969	3,500	5.7	---	---	---
1970	3,900	6.7	---	---	---
1971	4,600	7.7	---	---	---
1972	5,700	9.2	---	---	---
1973	6,600	10.2	---	---	---
1974	7,700	11.6	---	---	---
1975	8,600	12.6	140	0.2	1.6
1976	10,100	14.5	470	0.7	4.7
1977	11,200	15.9	980	1.4	8.7
1978	12,500	17.1	1,600	2.2	12.8
1979	13,600	18.3	3,100	4.2	22.8
1980	15,200	19.9	5,200	6.8	34.2
1981	17,830	22.3	8,100	10.1	45.5
1982	24,290	29.8	12,600	15.5	51.9
1983	28,320	34.0	16,160	19.4	60.9
1984	32,930	39.3	19,820	23.7	60.4
1985	36,340	42.8	21,840	25.7	59.0
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1989	47,770	52.8	26,100	28.9	54.6
1990	51,900	56.4	27,120	29.4	52.3
1991	54,860	58.9	27,040	29.0	49.3

Source: Cable-A.C. Nielsen (NTI), Jan. 1 each year
TVB estimates for pay cable prior to 1982.

Cable TV's Projected Growth

At Year End	Add (000) TV Households	Homes Passed	Cable TV Households	Cable TVHH as a % of: TVHH	Homes Passed
1992	93,400	86,200	56,590	61	66
1993	94,400	87,400	58,370	62	67
1994	95,500	88,400	60,130	63	68
1995	96,500	89,300	61,900	64	69
1996	97,600	90,100	63,380	65	70
1997	98,700	90,900	64,890	66	71
1998	99,800	91,700	66,430	67	72

Source: Paul Kagan Assoc.

Cable Penetration By County Size

County Size	1982	1983	1984	1985	1986	1987	1988	1989	1990
"A"	17.4%	27.0%	31.6%	36.2%	39.0%	42.1%	44.8%	49.8%	55.3%
"B"	35.0	43.7	48.4	51.8	54.3	56.0	58.5	61.9	64.6
"C"	46.0	50.8	53.8	55.3	56.4	57.0	58.8	61.1	63.6
"D"	31.7	38.3	40.3	41.8	42.4	43.1	44.7	47.0	48.6
Total	28.9%	37.1%	41.2%	44.5%	46.7%	48.7%	51.1%	54.8%	57.8%

Source: A.C. Nielsen (NSI)
Feb. each year

Cable Systems- A Profile

Cable Systems By Subscriber Size

	# Systems	% of Total	% of Total Subscribers
50,000+	194	2.0 %	37.4 %
20,000-49,999	396	4.1	25.4
10,000-19,999	493	5.1	14.2
5,000- 9,999	646	6.7	9.3
1,000- 4,999	2,077	21.6	10.1
Under 1,000	5,082	52.9	3.6
NA	724	7.5	---
TOTAL	9,612	100.0 %	100.0 %

Cable Systems By Channel Capacity

	# Systems	% of Total Systems	% of Total Subscribers
54+	808	8.4 %	24.0 %
30-53	4,846	50.4	65.3
20-29	1,370	14.3	7.3
13-19	283	2.9	0.4
12 & Under	1,113	11.6	1.3
NA	1,192	12.4	1.7
TOTAL	9,612	100.0 %	100.0 %

Source: TV & Cable Factbook
1990 Edition

Cable Ad Volume & Projections

	Cable Ad Volume (In Millions)	% Cable of Total TV
1980	$ 53	0.5%
1981	117	0.9
1982	213	1.5
1983	332	2.0
1984	538	2.7
1985	724	3.4
1986	855	3.7
1987	963	4.0
1988	1,196	4.7
1989	1,527	5.7
1990	1,755	6.1
1991	2,000	6.6
1992	2,226	6.9
1993	2,485	7.3
1994	2,772	7.4
1995	3,030	7.7
1996	3,399	7.9

Sources: McCann Erickson, 1980-89
TVB, 1990-96

Cable TV Network Advertising Revenues
By Network - Top 10 in 1990

		In Millions				
		1986	1987	1988	1989	1990*
1.	ESPN	$ 96.0	$125.0	$147.0	$176.0	$228.8
2.	USA	71.0	80.0	114.4	160.2	208.2
3.	CNN**	93.5	107.0	138.5	180.5	207.6
4.	MTV	82.4	78.0	91.8	106.0	122.4
5.	LIFE	35.1	44.1	68.2	87.1	102.4
6.	TNN	42.0	49.0	72.5	83.5	96.9
7.	TNT	-	-	3.7	40.0	89.0
8.	FAM	38.1	45.8	54.0	68.0	78.0
9.	NICK	16.4	26.8	31.8	51.8	67.1
10.	A&E	8.0	13.5	23.2	36.2	48.6
	TOTAL TOP 10	$482.5	$569.2	$745.1	$989.3	$1249.0

*Preliminary Estimates
**Includes CNN Headline

Source: Paul Kagan Assoc., Inc.

Top 10 Cable Network Advertisers: Jan.-Sept. 1990

		In Millions				
Rank	Parent Company	Cable	Network	Spot	Ntl. Synd.	Total
1.	Procter & Gamble	$ 41.2	$ 407.5	$ 213.6	$ 80.8	$ 743.1
2.	Time Warner, Inc.	37.3	47.6	59.2	13.3	157.4
3.	Philip Morris Cos., Inc.	22.1	329.1	183.9	115.0	650.1
4.	General Mills	20.2	107.8	134.7	10.7	273.4
5.	Anheuser-Busch Cos.,Inc.	18.8	83.4	82.9	10.8	195.9
6.	RJR Nabisco	17.5	110.2	14.2	18.2	160.1
7.	General Motors Corp.	14.6	374.6	91.2	16.8	497.2
8.	Sears Roebuck & Co.	14.5	190.9	31.6	7.5	244.5
9	Pepsico, Inc.	11.0	158.7	223.9	15.2	408.8
10	AT&T Co.	10.8	189.7	56.2	14.1	270.8
	Top 10 Total	$ 208.0	$1999.5	$1091.4	$ 302.4.	$3,601.3
	% of Total	5.8%	55.5%	30.3%	8.4%	100.0%

Source: Arbitron

Coverage Factors of the Major Cable Networks

	% U.S. Coverage						
	1984	1985	1986	1987	1988	1989	1990
FAM	25	32	35	39	44	49	52
CNN	30	37	39	44	50	55	59
ESPN	36	41	42	47	51	56	60
*HBO	23	25	22	22	22	23	23
*Showtime	8	10	9	9	10	11	12
USA	26	34	36	41	47	52	55
MTV	23	30	32	38	45	50	54
Nickelodeon	21	29	30	36	43	49	54
A & E	19	23	22	28	36	41	47
Lifetime	-	25	28	34	41	47	51
TWC	13	19	23	29	37	42	46
CNN Headline	-	18	21	26	34	39	44
TNN	16	25	29	34	43	48	53
FNN	-	16	20	24	31	36	36
BET	-	-	10	14	20	24	28
VH-1	-	-	13	21	28	34	38
Discovery	-	-	-	-	32	42	51

*Pay Services

(-) = Not available

Source: A.C. Nielsen (NTI)
Jan. each year

Cable Networks & Local Cable Channels Qualifying For Inclusion in the Local Market Rating Reports

	Number of Qualifying Markets*						
Cable Network:	Feb 1984	Feb 1985	Feb 1986	Feb 1987	Feb 1988	Feb 1989	Feb 1990
USA	5	12	22	52	49	116	150
ESPN	0	0	0	8	21	39	40
CNN	2	2	11	14	15	30	26
FAM	15	21	18	19	11	21	20
TNT	0	0	0	0	0	1	15
HBO	33	28	18	16	12	14	13
Nickleodeon	0	0	0	2	1	5	5
TNN	0	0	0	1	2	3	5
LIF	0	0	0	0	0	1	1
Showtime	1	0	0	0	0	0	0
Local Cable Channel:	1	2	2	2	1	1	1

*Any cable network that achieved a 20% net weekly circulation.

Any local cable channel that achieved a 3% net weekly circulation.

Source: Arbitron

Cable Audience Fragmentation By Daypart

% TV HOUSEHOLDS VIEWING DURING AVERAGE MINUTE

	TOTAL CABLE				TOTAL U.S.			
	10 am-4:30 pm (M-F)	4:30 - 7:30 pm (M-F)	8-11 pm (M-S)	11 pm 1 am (M-S)	10 am-4:30 pm (M-F)	4:30-7:30 pm (M-F)	8-11pm (M-S)	11pm-1 am (M-S)
Pay Cable								
CMX	0.2	0.4	0.8	0.9	0.2	0.2	0.5	0.5
HBO	0.9	1.2	2.5	2.0	0.6	0.7	1.6	1.2
SHOW	0.2	0.2	0.8	0.8	0.1	0.1	0.5	0.5
All Others	0.2	0.4	0.5	0.3	0.1	0.3	0.3	0.2
Ad-Supported								
A&E	0.2	0.4	0.6	0.3	0.1	0.2	0.4	0.3
BET	0.1	0.2	0.3	0.1	0.1	0.2	0.2	0.1
CNN	0.7	0.9	1.0	0.3	0.5	0.6	0.6	0.3
DISCOVERY	0.2	0.4	0.9	--	0.2	0.3	0.6	--
ESPN	0.4	0.9	2.3	0.7	0.3	0.5	1.4	0.7
FAM	0.2	0.6	0.6	0.2	0.1	0.3	0.4	0.2
FNN	0.1	0.1	--	--	0.1	--	--	--
HLN	0.3	0.3	0.2	0.1	0.2	0.2	0.1	0.1
LIFETIME	0.4	0.7	--	--	0.2	0.4	--	--
MTV	0.4	0.8	0.6	0.3	0.3	0.5	0.4	0.3
NICK	1.1	0.9	0.8	0.3	0.7	0.6	0.5	0.3
TNN	0.2	0.3	1.0	--	0.1	0.2	0.6	--
TNT	0.6	1.2	1.6	0.6	0.4	0.7	1.0	0.6
TWC	0.1	0.1	0.1	--	0.1	0.1	0.1	--
USA	1.1	1.4	2.1	0.8	0.7	0.8	1.3	0.8
VH-1	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.1
All Others	1.4	2.3	3.4	1.5	0.9	1.5	2.1	1.4

Source: Nielsen Cable Activity Report
Fourth Quarter 1990

Time Spent Viewing: On Air vs. Cable

In The Average TV Household

Average Time Spent Per Household Per Day

	Over The-Air	Change in Mins.	% Total Viewing	Cable Orig.	Change in Mins.	% Total Viewing	Pay Cable	Change in Mins.	% Total Viewing
1982	6:25	N/A	92	:12	N/A	3	:22	N/A	5
1983	6:39	+14	90	:21	+9	5	:23	+1	5
1984	6:36	-3	88	:29	+8	7	:25	+2	5
1985	6:31	-5	87	:34	+5	7	:27	+2	6
1986	6:30	-1	87	:37	+3	8	:22	-5	5
1987	6:11	-19	84	:45	+8	10	:26	+4	6
1988	6:07	-4	82	:53	+8	12	:29	+3	6
1989	5:54	-13	79	1:05	+12	15	:29	-	6
1990	5:35	-19	76	1:16	+11	17	:28	-1	7

Note: Data prior to Sept.'87 based on NTI Audimeter Sample. From Sept. '87 data based on NTI People Meter Sample.

CAUTION: ***During 1990, particularly during the February-April period, viewing levels as reported by the A.C. Nielsen Co. showed significant declines. To date, neither Nielsen nor any other industry sources have an explanation for these declines.***

Source: A.C. Nielsen (NTI)
Cable TV - A Status Report
Annual Averages

Prime Time Network Audience Trends During Cable's Growth Years

----------3-Network----------

	% HUT	AA %	SHARE	AA HOUSEHOLDS (millions)
1981	59.1	49.1	83	39.5
1982	59.0	46.3	78	38.0
1983	60.1	46.3	77	38.7
1984	59.9	44.6	74	37.5
1985	60.7	44.6	73	38.0
1986	59.9	43.8	73	37.8
1987	58.9	41.2	70	36.2
1988	58.4	38.4	66	34.3
1989	58.3	37.8	65	34.9
1990	57.5	35.3	61	32.6

HUT = Households Using Television

AA = Average Minute Audience

Source: A.C. Nielsen (NTI) Annual Averages

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Television Usage Per Week
By Cable Status of TV Households

	Non-Cable (40.0% of TVHH)		Basic Cable (28.9% of TVHH)		Pay Cable (31.1% of TVHH)		TV Households (100.0% of TVHH)	
	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share
Total*	43:37	100	48:25	100	59:32	100	49:44	100
Affiliates**	30:16	69	25:26	52	26:47	45	27:43	56
ABC	9:54	23	8:22	17	9:17	16	9:14	19
CBS	10:38	24	8:49	18	8:46	15	9:35	19
NBC	9:38	22	8:11	17	8:35	14	8:54	18
Ind. Com'l	13:02	30	10:04	21	12:19	21	11:56	24
Super Sta.	2:17	5	3:56	8	4:31	8	3:32	7
Local	10:07	23	5:09	11	6:49	12	7:34	15
Distant	:38	2	:59	2	:58	2	:50	2
Public	1:53	4	1:29	3	1:10	2	1:31	3
Cable Orig.	-	-	13:53	29	15:41	26	9:14	19
Pay Service	-	-	-	-	9:41	16	3:01	6

* **Sum of the parts exceed the total because of simultaneous viewing.**

** **Sum of the network is less than the total because viewing to multi-affiliates is included in the total.**

Source: **A.C. Nielsen (NTI) Monthly Cable Status Report - November 1990**

Stations and Channels Receivable vs. Viewed

	Average Receivable	Average Viewed	% Viewed
Total TV Households			
Total Channels	27.2	8.9	33%
Broadcast Stations	11.6	5.9	51%
Cable Channels	15.6	3.0	19%
Cable Households			
Total Channels	37.1	11.4	31%
Broadcast Stations	11.8	6.4	54%
Cable Channels	25.3	5.0	20%
Non-Cable Households			
Total Channels	12.3	5.2	42%
Broadcast Stations	11.3	5.2	46%
Cable Channels	1.0	*	---

Note: Viewed includes 10 or more continuous minutes during the week.

Source: Nielsen-NTI
Feb 5-11, 1990

* Less than 0.1%

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1969	3,500	5.7	---	---	---
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1971	4,600	7.7	---	---	---
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1973	6,600	10.2	---	---	---
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Source: Cable-A.C. Nielsen (NTI), Jan. 1 each year
TVB estimates for pay cable prior to 1982.

Cable TV's Projected Growth

At Year End	TV Households (Add (000))	Homes Passed (Add (000))	Cable TV Households (Add (000))	Cable TVHH as a % of: TVHH	Cable TVHH as a % of: Homes Passed
1992	93,200	89,900	56,200	60	63
1993	94,000	91,200	58,000	62	64
1994	94,700	92,300	59,700	63	65
1995	95,600	93,200	61,300	64	66
1996	96,400	94,100	62,800	65	67
1997	97,200	95,000	64,300	66	68
1998	98,000	95,800	65,800	67	69
1999	98,800	96,700	67,400	68	70
2000	99,700	97,600	69,000	69	71

Source: Paul Kagan Assoc.

Cable Penetration By County Size

County Size	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
"A"	17.4%	27.0%	31.6%	36.2%	39.0%	42.1%	44.8%	49.8%	55.3%	57.0
"B"	35.0	43.7	48.4	51.8	54.3	56.0	58.5	61.9	64.6	64.9
"C"	46.0	50.8	53.8	55.3	56.4	57.0	58.8	61.1	63.6	64.3
"D"	31.7	38.3	40.3	41.8	42.4	43.1	44.7	47.0	48.6	50.1
Total	28.9%	37.1%	41.2%	44.5%	46.7%	48.7%	51.1%	54.8%	57.8%	59.6%

Source: A.C. Nielsen (NSI)
Feb. each year

Cable Systems- A Profile

Cable Systems By Subscriber Size

	# Systems	% of Total	% of Total Subscribers
50,000+	203	1.9 %	38.7 %
20,000-49,999	410	3.8	25.2
10,000-19,999	496	4.6	13.8
5,000- 9,999	635	5.9	8.8
1,000- 4,999	2,175	20.3	9.9
Under 1,000	5,537	51.7	3.6
NA	1,248	11.7	0.0
TOTAL	10,704	100.0 %	100.0 %

Cable Systems By Channel Capacity

	# Systems	% of Total Systems	% of Total Subscribers
54+	979	9.2 %	28.4 %
30-53	5,509	51.5	63.8
20-29	1,315	12.3	5.3
13-19	311	2.9	0.3
12 & Under	950	8.9	1.0
NA	1,640	15.3	1.2
TOTAL	10,704	100.0 %	100.0 %

Source: TV & Cable Factbook
1991 Edition

Cable Ad Volume & Projections

	Cable Ad Volume (In Millions)	% Cable of Total TV
1980	$ 53	0.5%
1981	117	0.9
1982	213	1.5
1983	332	2.0
1984	538	2.7
1985	724	3.4
1986	855	3.7
1987	963	4.0
1988	1,196	4.7
1989	1,527	5.7
1990	1,789	6.3
1991	1,985	6.8
1992	2,286	7.3
1993	2,605	7.8
1994	2,946	8.2
1995	3,304	8.6
1996	3,671	8.9

Sources: McCann Erickson, 1980-90
TVB, 1991-96

Cable TV Network Advertising Revenues
By Network - Top 10 in 1991

		In Millions					
		1986	1987	1988	1989	1990	1991*
1.	ESPN	$ 96.0	$125.0	$147.0	$176.0	$260.0	$289.2
3.	CNN**	93.5	107.0	138.5	180.5	215.5	239.2
2.	USA	71.0	80.0	114.4	160.2	197.0	236.4
7.	TNT	-	-	3.7	40.0	105.0	152.3
4.	MTV	82.4	78.0	91.8	106.0	129.0	144.5
5.	LIFE	35.1	44.1	68.2	87.1	107.1	128.5
6.	TNN	42.0	49.0	72.5	83.5	96.9	106.6
8.	FAM	38.1	45.8	54.0	68.0	82.0	92.7
9.	NICK	16.4	26.8	31.8	51.8	69.0	79.4
10.	A&E	8.0	13.5	23.2	36.2	48.6	58.8
	TOTAL TOP 10	$482.5	$569.2	$745.1	$989.3	$1310.1	$1527.6

*Preliminary Estimates
**Includes CNN Headline

Source: Paul Kagan Assoc., Inc.

Top 10 Cable Network Advertisers: Jan.-Dec. 1990

		In Millions				
Rank	Parent Company	Cable	Network	Spot	Ntl. Synd.	Total
1.	Procter & Gamble	$ 57.9	$ 557.6	$ 303.2	$ 118.7	$ 1037.4
2.	Time Warner, Inc.	50.9	72.0	81.8	27.6	232.3
3.	General Mills	27.4	142.9	191.5	15.1	376.9
4.	Anheuser-Busch Cos.,Inc.	26.8	129.0	91.6	13.7	261.1
5	Philip Morris Cos.,Inc.	26.6	402.2	221.2	113.8	763.8
6.	General Motors Corp.	26.0	598.4	136.5	27.6	788.5
7.	RJR Nabisco	21.7	133.6	17.3	22.1	194.7
8.	Sears Roebuck & Co.	19.8	253.8	37.5	13.6	324.7
9.	AT&T Co.	15.3	244.9	69.0	20.0	349.2
10.	Pepsico, Inc.	13.1	193.4	284.6	18.0	509.1
	Top 10 Total	$ 285.5	$2,727.8	$1,434.2	$ 390.2	$4,837.7
	% of Total	5.9%	56.4%	29.6%	8.1%	100.0%

Source: Arbitron

Coverage Factors of the Major Cable Networks

	% U.S. Coverage							
	1984	1985	1986	1987	1988	1989	1990	1991
FAM	25	32	35	39	44	49	52	56
CNN	30	37	39	44	50	55	59	61
ESPN	36	41	42	47	51	56	60	62
*HBO	23	25	22	22	22	23	23	22
*Showtime	8	10	9	9	10	11	12	10
USA	26	34	36	41	47	52	55	59
MTV	23	30	32	38	45	50	54	57
Nickelodeon	21	29	30	36	43	49	54	57
A&E	19	23	22	28	36	41	47	52
Lifetime	-	25	28	34	41	47	51	55
TWC	13	19	23	29	37	42	46	51
CNN Headline	-	18	21	26	34	39	44	61
TNN	16	25	29	34	43	48	53	56
FNN	-	16	20	24	31	36	36	38
BET	-	-	10	14	20	24	28	32
VH-1	-	-	13	21	28	34	38	42
Discovery	-	-	-	-	32	42	51	57

*Pay Services

(-) = Not available

Source: A.C. Nielsen (NTI)
Jan. each year

Cable Audience Fragmentation By Daypart

% TV HOUSEHOLDS VIEWING DURING AVERAGE MINUTE

	TOTAL CABLE				TOTAL U.S.			
	10 am-4:30 pm (M-F)	4:30 - 7:30 pm (M-F)	8-11 pm (M-S)	11 pm 1 am (M-S)	10 am-4:30 pm (M-F)	4:30-7:30 pm (M-F)	8-11pm (M-S)	11pm-1 am (M-S)
Pay Cable								
CMX	0.2	0.4	0.8	0.9	0.2	0.2	0.5	0.5
HBO	0.9	1.2	2.5	2.0	0.6	0.7	1.6	1.2
SHOW	0.2	0.2	0.8	0.8	0.1	0.1	0.5	0.5
All Others	0.2	0.4	0.5	0.3	0.1	0.3	0.3	0.2
Ad-Supported								
A&E	0.2	0.4	0.6	0.3	0.1	0.2	0.4	0.3
BET	0.1	0.2	0.3	0.1	0.1	0.2	0.2	0.1
CNN	0.7	0.9	1.0	0.3	0.5	0.6	0.6	0.3
DISCOVERY	0.2	0.4	0.9	--	0.2	0.3	0.6	--
ESPN	0.4	0.9	2.3	0.7	0.3	0.5	1.4	0.7
FAM	0.2	0.6	0.6	0.2	0.1	0.3	0.4	0.2
FNN	0.1	0.1	--	--	0.1	--	--	--
HLN	0.3	0.3	0.2	0.1	0.2	0.2	0.1	0.1
LIFETIME	0.4	0.7	--	--	0.2	0.4	--	--
MTV	0.4	0.8	0.6	0.3	0.3	0.5	0.4	0.3
NICK	1.1	0.9	0.8	0.3	0.7	0.6	0.5	0.3
TNN	0.2	0.3	1.0	--	0.1	0.2	0.6	--
TNT	0.6	1.2	1.6	0.6	0.4	0.7	1.0	0.6
TWC	0.1	0.1	0.1	--	0.1	0.1	0.1	--
USA	1.1	1.4	2.1	0.8	0.7	0.8	1.3	0.8
VH-1	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.1
All Others	1.4	2.3	3.4	1.5	0.9	1.5	2.1	1.4

Source: Nielsen Cable Activity Report
Fourth Quarter 1990

Time Spent Viewing: On Air vs. Cable

In The Average TV Household

Average Time Spent Per Household Per Day

	Over The-Air	Change in Mins.	% Total Viewing	Cable Orig.	Change in Mins.	% Total Viewing	Pay Cable	Change in Mins.	% Tota Viewinç
1982	6:25	N/A	92	:12	N/A	3	:22	N/A	5
1983	6:39	+14	90	:21	+9	5	:23	+1	5
1984	6:36	-3	88	:29	+8	7	:25	+2	5
1985	6:31	-5	87	:34	+5	7	:27	+2	6
1986	6:30	-1	87	:37	+3	8	:22	-5	5
1987	6:11	-19	84	:45	+8	10	:26	+4	6
1988	6:07	-4	82	:53	+8	12	:29	+3	6
1989	5:54	-13	79	1:05	+12	15	:29	-	6
1990	5:35	-19	76	1:16	+11	17	:28	-1	7

Note: Data prior to Sept.'87 based on NTI Audimeter Sample. From Sept. '87 data based on NTI People Meter Sample.

CAUTION: ***During 1990, particularly during the February-April period, viewing levels as reported by the A.C. Nielsen Co. showed significant declines. To date, neither Nielsen nor any other industry sources have an explanation for these declines.***

Source: A.C. Nielsen (NTI)
Cable TV - A Status Report
Annual Averages

Prime Time Network Audience Trends During Cable's Growth Years

	3-Network			
	% HUT	AA %	SHARE	AA HOUSEHOLDS (millions)
1981	59.1	49.1	83	39.5
1982	59.0	46.3	78	38.0
1983	60.1	46.3	77	38.7
1984	59.9	44.6	74	37.5
1985	60.7	44.6	73	38.0
1986	59.9	43.8	73	37.8
1987	58.9	41.2	70	36.2
1988	58.4	38.4	66	34.3
1989	58.3	37.8	65	34.9
1990	57.5	35.2	61	32.6

HUT = Households Using Television

AA = Average Minute Audience

Source: A.C. Nielsen (NTI) Annual Averages

Note: Data prior to Sept.'87 based on NTI Audimeter Sample. From Sept. '87 data based on NTI People Meter Sample.

CAUTION: ***During 1990, particularly during the February-April period, viewing levels as reported by the A.C. Nielsen Co. showed significant declines. To date, neither Nielsen nor any other industry sources have an explanation for these declines.***

Television Usage Per Week
By Cable Status of TV Households

	Non-Cable (36.3% of TVHH)		Basic Cable (34.6% of TVHH)		Pay Cable (29.1% of TVHH)		TV Households (100.0% of TVHH)	
	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share
Total*	41:07	100	43:40	100	56:43	100	46:32	100
Affiliates**	28:44	70	22:23	51	23:29	41	25:02	54
ABC	9:37	23	7:16	17	8:14	14	8:24	18
CBS	9:56	24	7:52	18	7:24	13	8:24	18
NBC	9:05	22	7:13	17	7:49	14	8:04	17
Ind. Com'l	12:00	29	8:57	20	11:39	20	10:55	23
Super Sta.	2:14	5	3:20	8	4:34	8	3:22	7
Local	9:10	23	4:41	11	6:10	11	6:43	14
Distant	:37	2	:55	2	:55	1	:50	2
Public	1:47	5	1:19	3	1:11	2	1:31	3
Cable Orig.	-	-	13:05	30	15:21	29	9:25	20
Pay Service	-	-	-	-	9:50	17	3:01	6

* Sum of the parts exceed the total because of simultaneous viewing.

** Sum of the network is less than the total because viewing to multi-affiliates is included in the total.

Source: A.C. Nielsen (NTI) Monthly Cable Status Report - April 1991

Stations and Channels Receivable vs. Viewed

	Average Receivable	Average Viewed	% Viewed
Total TV Households			
Total Channels	27.2	8.9	33%
Broadcast Stations	11.6	5.9	51%
Cable Channels	15.6	3.0	19%
Cable Households			
Total Channels	37.1	11.4	31%
Broadcast Stations	11.8	6.4	54%
Cable Channels	25.3	5.0	20%
Non-Cable Households			
Total Channels	12.3	5.2	42%
Broadcast Stations	11.3	5.2	46%
Cable Channels	1.0	*	---

Note: Viewed includes 10 or more continuous minutes during the week.

Source: Nielsen-NTI
Feb 5-11, 1990

* Less than 0.1%